

STATE OF INDIANA)
)SS:
COUNTY OF _____)

IN THE MATTER OF THE ESTATE OF _____)
)
_____, DECEASED.)

**AFFIDAVIT OF TRANSFEREE OF TRUST PROPERTY THAT NO
INDIANA INHERITANCE OR ESTATE TAX IS DUE ON THE TRANSFER**

Comes now _____, being first duly sworn upon his/her oath, says that:

1. Transferee _____, is a trust beneficiary, successor trustee
(*strike inappropriate terms*) of the _____ Trust, under agreement dated and signed on the
_____ day of _____, 19____ and last amended on the _____ day of _____, 19____.

2. That the original grantor, _____, whose social security number is _____, of the above
stated trust died on the _____ day of _____, 19____, a resident of _____, County, Indiana.

3. Transferee (a) is domiciled in Indiana, or (b) is a representative of _____,
a corporation doing business in Indiana. (*Strike either (a) or (b), whichever is not pertinent.*)

4. That the following personal property sought to be transferred is held by the trust:

Holding Institution	Description of Property	Date of Death Value
_____	_____	_____
_____	_____	_____

5. That the transfer of the trust personal property is not subject to Indiana inheritance or estate tax for the following reason:

6. Transferee, by making this affidavit, says that the above trust personal property will be transferred to him/her and is not subject to Indiana inheritance or estate tax and further says, under the penalties for perjury, that the statements herein are true and correct to the best of such person's knowledge and belief.

Signature of transferee

Name (typed or printed)

Address

STATE OF INDIANA)
)SS:
COUNTY OF _____)

Subscribed and sworn to under penalties for perjury before me, a Notary Public in and for said County and State, this _____ day of
_____, 19____.

Signature _____ My Commissions Expires: _____

Printed _____ Residing in _____ County, Indiana.

NOTE: This affidavit must immediately be filed with the Indiana Department of Revenue, Inheritance Tax Division, P.O. Box 71, Indianapolis, IN 46206-0071.